

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, state bar number, and address):     TELEPHONE AND FAX NOS.:  	<b>FOR COURT USE ONLY</b>
ATTORNEY FOR (Name): <b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF</b> STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:	
ESTATE OF (Name):  <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> DECEDENT         <input type="checkbox"/> CONSERVATEE         <input type="checkbox"/> MINOR       </div>	
<div style="text-align: center;"><b>INVENTORY AND APPRAISAL</b></div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> <b>Partial No.:</b>  <input type="checkbox"/> <b>Final</b>  <input type="checkbox"/> <b>Supplemental</b> </div> <div style="width: 45%;"> <input type="checkbox"/> <b>Corrected</b>  <input type="checkbox"/> <b>Reappraisal for Sale</b>  <input type="checkbox"/> <b>Property Tax Certificate</b> </div> </div>	
CASE NUMBER:  Date of Death of Decedent or of Appointment of Guardian or Conservator:	

**APPRAISALS**

1. Total appraisal by representative, guardian, or conservator (Attachment 1): \$
2. Total appraisal by referee (Attachment 2): \$
- TOTAL: \$**

**DECLARATION OF REPRESENTATIVE, GUARDIAN, CONSERVATOR, OR SMALL ESTATE CLAIMANT**

3. Attachments 1 and 2 together with all prior inventories filed contain a true statement of  
☐ all ☐ a portion of the estate that has come to my knowledge or possession, including particularly all money and all just claims the estate has against me. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 1.
4. ☐ No probate referee is required ☐ by order of the court dated (specify):
5. **Property tax certificate.** I certify that the requirements of Revenue and Taxation Code section 480
- ☐ are not applicable because the decedent owned no real property in California at the time of death.
  - ☐ have been satisfied by the filing of a change of ownership statement with the county recorder or assessor of each county in California in which the decedent owned property at the time of death.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

.....

(TYPE OR PRINT NAME; INCLUDE TITLE IF CORPORATE OFFICER)

\_\_\_\_\_  
(SIGNATURE)

**STATEMENT ABOUT THE BOND**

(Complete if required by local court rule)

6. ☐ Bond is waived, or the sole fiduciary is a corporate fiduciary or an exempt government agency.
7. ☐ Bond filed in the amount of: \$ ☐ Sufficient ☐ Insufficient
8. ☐ Receipts for: \$ \_\_\_\_\_ have been filed with the court for deposits in a blocked account at (specify institution and location):

Date:

.....

(TYPE OR PRINT NAME)

\_\_\_\_\_  
(SIGNATURE OF ATTORNEY OR PARTY WITHOUT ATTORNEY)

(Continued on reverse)

ESTATE OF (Name): <div style="border-bottom: 1px solid black; height: 1.2em; margin-top: 5px;"></div> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> <input type="checkbox"/> DECEDENT    <input type="checkbox"/> CONSERVATEE    <input type="checkbox"/> MINOR       </div>	CASE NUMBER: <div style="border-bottom: 1px solid black; height: 1.2em; margin-top: 5px;"></div>
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### DECLARATION OF PROBATE REFEREE

9. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 2.
10. A true account of my commission and expenses actually and necessarily incurred pursuant to my appointment is

Statutory commission:     \$

Expenses (*specify*):         \$

**TOTAL:** \$

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

. . . . . (TYPE OR PRINT NAME)	<div style="display: flex; align-items: center; justify-content: center;"> </div> (SIGNATURE OF REFEREE)
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### INSTRUCTIONS

(See Probate Code sections 2610-2616, 8801, 8804, 8852, 8905, 8960, 8961, and 8963 for additional instructions.)

1. See Probate Code section 8850 for items to be included in the inventory.
2. If the minor or conservatee is or has been during the guardianship or conservatorship confined in a state hospital under the jurisdiction of the State Department of Mental Health or the State Department of Developmental Services, mail a copy to the director of the appropriate department in Sacramento (Prob. Code, § 2611).
3. The representative, guardian, conservator, or small estate claimant shall list on Attachment 1 and appraise as of the date of death of the decedent or date of appointment of the guardian or conservator at fair market value moneys, currency, cash items, bank accounts and amounts on deposit with each financial institution (as defined in Probate Code section 40), and the proceeds of life and accident insurance policies and retirement plans payable upon death in lump sum amounts to the estate, except items whose fair market value is, in the opinion of the representative, an amount different from the ostensible value or specified amount.
4. The representative, guardian, conservator, or small estate claimant shall list in Attachment 2 all other assets of the estate which shall be appraised by the referee.
5. If joint tenancy and other assets are listed for appraisal purposes only and not as part of the probate estate, they must be separately listed on additional attachments and their value excluded from the total valuation of Attachments 1 and 2.
6. Each attachment should conform to the format approved by the Judicial Council (see *Inventory and Appraisal Attachment* (form DE-161, GC-041) and Cal. Rules of Court, rule 201).